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Kazakhstan, Republic of

Grain and Feed

Update

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Report Highlights:

Kazakhstan's MY 2003/04 wheat production forecast is unchanged at 11.5 million metric tons (MMT). MY2002/03 wheat exports increased to 6.5 MMT due to higher than expected exports of wheat and wheat flour to Russia and Ukraine. The MY2003/04 wheat export forecast is also increased to 6.0 MMT due to anticipated better quality of wheat and higher demand for the wheat in Ukraine and Russia.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Unscheduled Report
Ankara [TU1], KZ

Production

The MY 2003/2004 wheat production forecast is unchanged at 11.5 MMT. The harvest campaign has started in the southern regions of the country. According to a Ministry of Agriculture report on August 20, 2003, farmers harvested grain on 1.0 million hectares and collected about 1.8 MMT (bunker weight) of grain (winter wheat and barley). A long and cold spring resulted in a delay of at least two weeks for the harvest in major wheat growing regions of Northern Kazakhstan. Grain harvest there will start at the middle of September.

Since the middle of August 2003 to present, prices for diesel fuel in Kazakhstan increased over 25 percent. Some specialists are afraid that due to inadequate fuel supplies, the grain harvest will be extended resulting in additional losses.

PSD Table						
Country:	Kazakhstan, Republic of					
Commodity:	Wheat					
		2001		2002		2003
	Old	New	Old	New	Old	New
Market Year Begin		07/2001		07/2002		07/2003
Area Harvested	10700	10700	11500	11500	11500	11300
Beginning Stocks	1450	1450	5200	5200	6660	5515
Production	12700	12700	12600	12600	11500	11500
TOTAL Mkt. Yr. Imports	15	15	25	15	15	0
Jul-Jun Imports	15	15	25	15	15	0
Jul-Jun Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	14165	14165	17825	17815	18175	17015
TOTAL Mkt. Yr. Exports	3780	3780	5500	6500	5500	6000
Jul-Jun Exports	3780	3780	5500	6500	5500	6000
Feed Dom. Consumption	1500	1500	1800	1800	2000	1800
TOTAL Dom. Consumption	5185	5185	5665	5800	6100	6000
Ending Stocks	5200	5200	6660	5515	6575	5015
TOTAL DISTRIBUTION	14165	14165	17825	17815	18175	17015

Trade

The MY2002/03 total wheat export figure is increased by 1.5 MMT from the previous report due to higher than expected wheat flour exports and higher unrecorded exports to neighbouring countries. Total MY2002/03 wheat exports are now estimated at 6.5 MMT. According to official export data, in MY2002/2003 Kazakhstan has exported about 5.0 MMT of wheat and 500,000 MT of wheat flour (equivalent to 630,000 MT of wheat). Also, specialists estimate unrecorded wheat and wheat flour exports of at least 900,000 MT. Most of these unrecorded shipments have

been made to the Russian border for further re-exports to avoid high transit tariffs. The Government of Russia provides preferences for transportation for Russian produced wheat.

The MY 2003/04 wheat export forecast is increased to 6.0 MMT due to anticipated higher demand from Russia and Ukraine and expected higher quality of grain. The Government of Ukraine has signed contracts for imports of 1.2 MMT Kazakhstan's wheat.

Export Trade Matrix			
Country:		Units:	
Commodity:			
Time period:			
Exports for	2001		2002
U.S.	5	U.S.	18
Others		Others	
Iran	1050	Russia	800
Azerbaijan	467	Jordan	705
Uzbekistan	403	Tunis	480
Russia	325	Tajikistan	450
Tajikistan	310	Italy	440
Kyrgyzstan	174	Azerbaijan	430
Turkey	154	Ukraine	365
Afghanistan	149	Turkey	300
Norway	95	France	340
Jordan	52	Afghanistan	200
Total for Others	3179		4510
Others not listed	341		1972
Grand Total	3525		6500

Stocks

MY 2002/03 ending stocks are estimated at 5.3 MMT about 2.4 MMT less than the previous forecast due to higher than expected exports. Total wheat state reserves are estimated at 500,000 MT with the remaining amount held by private companies.

Barley

Kazakhstan's barley production estimate remains unchanged. Stocks are reduced reflecting an increase in feed consumption in 2002/03.

PSD Table						
Country:	Kazakhstan, Republic of					
Commodity:	Barley					
		2001		2002		2003
	Old	New	Old	New	Old	New
Market Year Begin		07/2001		07/2002		07/2003
Area Harvested	1700	1700	1750	1750	1800	1900
Beginning Stocks	986	986	1147	1147	1047	950
Production	2200	2200	2200	2200	1800	1800
TOTAL Mkt. Yr. Imports	8	8	0	3	0	0
Oct-Sep Imports	7	0	0	3	0	0
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	3194	3194	3347	3350	2847	2750
TOTAL Mkt. Yr. Exports	397	397	500	500	500	500
Oct-Sep Exports	393	397	500	500	500	500
Feed Dom. Consumption	1550	1550	1700	1800	1850	1850
TOTAL Dom. Consumption	1650	1650	1800	1900	1950	1950
Ending Stocks	1147	1147	1047	950	397	300
TOTAL DISTRIBUTION	3194	3194	3347	3350	2847	2750

Trade

Kazakhstan's MY2002/03 barley export estimate remains unchanged at 500,000 MT. According to official trade data barley exports were 420,000 MT, but specialists assume that unrecorded exports to the Russia totalled about 80,000 MT.

Export Trade Matrix			
Country:		Units:	
Commodity:			
Time period:			
Exports for	2001		2002
U.S.		U.S.	
Others		Others	
Saudi Arabia	204	Saudi Arabia	325
Iran	153	Russia	100

Estonia	16	Tunis	16
Ukraine	5	Azerbaijan	12
Russia	5	Spain	11
Kyrgyzstan	3	Byelorussia	10
Netherlands	3	Ukraine	9
Uzbekistan	2	Uzbekistaan	5
UAE	2	Netherlands	4
Austria	1	Lithuania	2
Total for Others	394		494
Others not listed	3		6
Grand Total	397		500